CHESAPEAKE OYSTER INNOVATION AWARD PROGRAM

CHESAPEAKE BAY TRUST

108 SEVERN AVENUE, ANNAPOLIS, MD 21403

(410) 974-2941 | WWW.CBTRUST.ORG

Introduction and Program Goals

The [Chesapeake Bay Trust](#) (Trust) is partnering with the [Chesapeake Oyster Alliance](#) (COA), a multi-year collaborative initiative supported by the Chesapeake Bay Foundation (hereafter referred to as 'funding partner'). The COA is designed to spark public attention to accelerate ongoing oyster restoration efforts in the Chesapeake Bay. Funding made available from the funding partner will support the ambitious goals of this collaborative effort. The goals of the COA can be viewed [here](#).

Oysters, oyster restoration, and oyster aquaculture activities world-wide provide a range of environmental and economic benefits, such as providing and enhancing marine habitat for commercial and recreational fish; boosting the economy through seafood production and by providing a way of life for watermen; buffering sensitive coastal shorelines from wave energy; and offering water quality improvements through filtration. Oyster aquaculture can reduce pressure on wild oyster stocks and has been implemented as a complement to wild harvest around the globe. Oyster aquaculture has been recognized by the Chesapeake Bay Program as a nutrient reduction Best Management Practice (BMP) for the Chesapeake Bay; however, several aspects of this BMP can be refined for cost effectiveness, improved ecological value, increased adoption, and cultural sensitivity.

The purposes of this award program are to 1) increase knowledge within priority audiences of the value of oysters, oyster fisheries, and aquaculture, 2) advance technologies for increasing oyster population or aquaculture production, 3) advance oyster monitoring techniques.

The Trust is committed to the advancement of diversity and inclusion in its award-making and environmental work. As a result, the Trust strongly encourages applications directly from underrepresented groups, and for projects that increase awareness and participation of communities that are traditionally underrepresented, such as communities of color. For a full description of the Trust's efforts to engage under-engaged groups, see our [strategic plan](#) and our [Diversity and Inclusion statement](#). The funding partner is also committed to Diversity, Equity, Inclusion & Justice. Read more about the [Chesapeake Bay Foundation's commitment](#) to putting this into action.

Funding partners acknowledge that there are debates occurring among various stakeholder groups in the oyster realm, from siting issues to cultural issues. While these stakeholder groups disagree on certain topics, they do agree on a number of key points including: the ecological and economic importance of oysters to the Chesapeake system, the rich cultural history of the Chesapeake oyster, and the desire to increase the number of oysters in the Bay for economic, cultural, and ecological reasons. This program seeks to support projects which serve to help advance the commonly held stakeholder goals.

> **PLEASE READ**: The Trust recognizes that application processes can be complicated and time-consuming; the Trust continues to work to simplify our application processes where possible. Any COA member who is experiencing a barrier to applying is eligible to receive guidance on the application process. Please contact Program Coordinator Amber Cameron at acameron@cbtrust.org or 410-974-2941 x124.
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> Applicants are encouraged to contact Trust staff to discuss applications at least two weeks prior to the deadline. The Trust cannot guarantee project development assistance within two weeks of the deadline.

At A Glance

The Oyster Innovation Program will support projects to advance proof-of-concept oyster and/or aquaculture education and restoration initiatives.

Eligible Applicants
Only official Chesapeake Oyster Alliance Partners may apply.

Eligible Project Locations
This program funds projects in Maryland and Virginia.

Request Amounts
Up to $10,000.

Deadline
Thursday, September 7, 2023, at 4:00 PM EST

Submit Your Application
Follow the instructions online at https://www.grantrequest.com/FormQuiz.aspx?sid=1520&aid=96476

Contact
Amber Cameron
410-974-2941 ext. 124
acameron@cbtrust.org

Eligible Applicants and Project Locations

Funding partners welcome requests from core Partners of the Chesapeake Oyster Alliance (COA), which is comprised of community organizations, academic institutions, and both for-profit and 501(c)(3) nonprofit organizations.

If your organization is not a member of the COA but is interested in becoming a member and thus create eligibility to apply to this program, please contact Tanner Council at TCouncil@cbf.org.

This program funds projects occurring in Maryland and Virginia.

Eligible applicants will have and maintain in full force and effect during the term of the proposed project liability insurance coverage in connection with the performance or failure to perform services proposed.

Eligible Project Types

Applicants can request funds from one of the following tracks:

- **Track 1: Education** – projects that increase knowledge within priority audiences of the value of oysters, oyster fisheries, and aquaculture;
- **Track 2: Technology** – projects that advance technologies for increasing oyster population or aquaculture production; and/or
- **Track 3: Monitoring** – projects that advance oyster population monitoring techniques.

Projects that increase knowledge and implementation of effective, appropriate oyster and aquaculture-related practices common in other estuarine systems are encouraged. In particular, this program seeks proposals in which a small amount of investment can make a notable difference in supporting a COA Partner and helping to advance stewardship and restoration goals within the Chesapeake Bay.

Examples of project types include but are not limited to:

- projects that educate residents about the value of oysters and/or aquaculture through the development of scientific web-based content (e.g. – short videos, infographics, etc.),
- new designs for oyster gardening cages or other activities that improve the oyster population, and
- development and piloting of innovative, low-cost technologies for remote water quality monitoring.

A more robust list of project types that are eligible can be found in the appendices below.

Project Timeline: You will have 12 months to complete your project from the time you receive the award. Requests to extend the project completion period will be reviewed and considered on a case-by-case basis.

A final report of each project is required at the end of the project timeline. These reports may be shared with other COA Partners or the public at-large to spur similar innovation within the Bay watershed and beyond.

If you have an idea that is not listed above, but meets one or more of the program's three goals, contact Amber Cameron at (410) 974-2941 ext. 124 or acameron@cbtrust.org to discuss your idea before applying.

Funding Availability

Funding Availability: The Trust has $150,000 available for this program. Applicants may request up to $10,000. Individual COA members may NOT submit applications for a joint project that would exceed the $10,000 maximum request per project.

Project Timeline: Projects must be completed within 12 months upon receipt of the award. Requests to extend the project completion period will be reviewed and considered on a case-by-case basis.

Online Application Submission Instructions

The Trust uses an online system for the application process, and if awarded, project management. To apply for an award, go to: https://www.grantrequest.com/FormQuiz.aspx?sid=1520&aid=96476 and click on "Get Started" to begin a new application. This will open a new window asking you to log in or create an account in our online system. If you have applied in the past, sign in with your email address and password. If you have forgotten your password, click on "Forgot Password" to reset your password. If you have not used our online system before, click on "New Applicant" and follow the instructions.

By submitting an application, applicants acknowledge that: 1) they are compliant with federal employment and non-discrimination laws and 2) they have not been debarred, convicted, charged or had a civil judgment rendered against them for fraud or a related offense by any government agency or been terminated for cause or default by any government agency (federal, state, or local). In addition, all final products will be provided to the funding partners for use and distribution at the sole discretion of the funding partners.

Late or incomplete applications will not be accepted. The online funding opportunity will close automatically and promptly on Thursday, September 7, 2023, at 4 PM EST. Applicants are strongly encouraged to submit at least a few days prior to the deadline given potential for high website traffic on the due date. The Trust cannot guarantee the availability of technical assistance for our online system on the deadline date.

Online Application Form

You will be asked to provide the following minimum information on the online application form.

Eligibility Quiz (required)

- This three-question quiz is meant to help you determine if your project meets this award program's requirements and that your staff/organizational structure best supports a successful application.

Applicant Information Tab (required)

- Provide the organization's name, mailing address, phone number, organization type, mission, and Employer Identification Number (EIN).
- Provide the Executive Officer and Project Leader's name, title, address, phone, and email address.
    - Both an Executive Officer and a Project Leader, two separate individuals, must be identified for all applications. Please contact Amber Cameron if providing two contacts presents a challenge.

Video Instructions

Watch our 13-minute video on how to apply at https://cbtrust.org/grants/

- o The Executive Officer and Project Leader must both be able to make decisions on behalf of the organization either as a board member, an employee, or other approved position recognized by the organization but not a contractor of the application.
- o To avoid conflict of interest issues, individuals associated with for-profit entities to be subcontracted in the project cannot serve in either role.

Project Information Tab (required)

- a project title;
- project description (1-3 sentences), in which you identify the main purpose of your project;
- the county and legislative districts (State Senate and House of Delegates) in which the project is located;
- the address of the project. If on-water or other non-addressed area, please provide latitude and longitude of the project (you may use Google Maps or similar platform to find these coordinates).

Timeline Tab (required)

- Add the project start and end date. Provide a project timeline that includes major tasks and their associated start and end dates.

Deliverables Tab

- Provide estimated metrics for your proposed project such as project participants, number of oysters to be raised and/or released, etc. Leave those not relevant to your project blank.

Project Partnerships Tab (optional)

- Provide a list of project partner organizations or contractors, individuals, their areas of expertise, and their role(s) in your project.

Definitions

The Executive Officer is the individual that oversees the organization (e.g., Executive Director, Chief Executive Officer, Mayor, President or Vice President, Principal (for schools), etc.) and has the authority to sign/execute award agreements on behalf of the organization. The Executive Officer information is tied directly to all the organization's applications and should not vary from application to application. If the Executive Officer could be listed as the Project Leader in a future proposal, we recommend listing a Board Member or other higher-ranking position of the organization as the Executive Officer in order to reduce the variation in the Executive Officer across applications.

The Program Leader is the individual will be responsible for all project coordination and correspondence with the Trust for the duration of the project. The email address entered here MUST be the same as the email address you used to log in to the online system. The Project Leader is the primary point of contact for the application, and the email address used to submit the application via the online system must be that of the Project Leader. Applications in which the email address associated with the Project Leader in the applicant information tab of the online opportunity does not match the email address used to submit the application will not be considered for funding. The Trust cannot conduct any official correspondence with contractors or other project partners. If at any time the Project Leader cannot continue in the position, the organization must contact the Trust and assign a new qualified Project Leader.

Applicants are encouraged to upload a Letter of Commitment for the project from each partner under the narrative tab describing in detail the partner's role or contribution to the project. Applications including strong Letter(s) of Commitment often receive higher scores. If not submitted with the application, Letter(s) of Commitment may be required prior to the release of any awarded funding. To better understand the Trust's definition of and policy on Letter(s) of Commitment, visit our Forms and Policies webpage: www.cbtrust.org/forms.

Volunteers Tab (optional)

- Provide a description of volunteer activities, the estimated number of volunteers, and estimated total number of volunteer hours.

Narrative and Supporting Documents Tab - Project Narrative (required)

Use the links below to download the *required* narrative questions template. Complete all questions and upload the completed document as a Microsoft Word or PDF file.

Narrative Questions

Budget Tab (required)

1. **Financial Management Spreadsheet – Application Budget Upload (required)**
   a. You will be asked to upload your budget using the "Application Budget" worksheet of the Chesapeake Bay Trust's **Financial Management Spreadsheet** (FMS), an excel file template. The template can be found by visiting https://cbtrust.org/forms-policies/ where you can watch a video with instructions on how to complete the FMS.
2. **Personnel/Contractor Request Description (optional)**
   a. If personnel and/or contractual costs are requested, please use this section to provide detailed information about the scope(s) of work for the individual or contractor.
3. **Financial Management Spreadsheet – Application Budget Information (required)**
   a. This online application component will ask you to enter budget category and request totals. These totals will be automatically calculated in the FMS Application Budget, so you will only need to copy and paste the values from the FMS to the Online Application.
4. **Additional Budget Justification (required)**
   a. This online application component will ask you to provide a descriptive budget narrative to justify and explain costs. If the success of the work is contingent upon award of other funds, make this clear in your budget justification section.

Terms and Conditions Tab (required)

o Agree to the specified terms and conditions

Demographics Tab (optional)

o Provide voluntary demographic information
o Provide information about your organization's current diversity, equity, inclusion, and justice (DEIJ) efforts and future goals

Evaluation Criteria

Scoring Criteria	Description and Scoring Guidance	Scoring
Project Goals		
Consistency with Request for Proposals (RFP)	Is the project proposed consistent with the purpose of the program? Is the topic within the "common ground" realm among key stakeholder groups as described in the "Eligible Project Types" section above? Are all required application components included for sound evaluation of the application?	Scale of 1 to 15
How the Project is Innovative		
Innovation	Is the project proposed a new idea in the oyster world, and/or to the Chesapeake region? What new information can be produced/shared from the project that advances the goals of the program?	Scale of 1 to 10
Who is Engaged		
Priority Audience	Based on applicant provided information, is the audience being engaged in the project identified as historically under-engaged or under-served through indicators such as, but not limited to, communities that were at any point historically redlined or graded as "hazardous" by the Home Owners' loan corporation, socioeconomic status (communities in which median household income is equal to or less than 75% of state-wide median household income or have high poverty and unemployment rates (https://www.census.gov)), or other relevant characteristics as identified in the MD EJScreen Tool?	Scale of 1 to 5
Partnerships	Are any key partnerships required, and if so, are the selected partnerships appropriate? Are any partners missing that should have been engaged? Is the community to be served involved appropriately in the project; i.e., was community buy-in obtained, were community needs and desires assessed? Have appropriate letters of commitment for project from Partners or the Community been incorporated?	Scale of 1 to 10
Project Plan		
Likelihood of Project Success	What is the likelihood of success if this project were to be selected for funding? Success should be defined as the accomplishment of the outcomes and outputs proposed. Is there a clear plan for producing outputs and achieving the outcomes proposed? Are methodologies sound and consistent with best practices? Have any potentially mandatory permits been obtained or planned?	Scale of 1 to 20
Impact		
Long-term Sustainability	Will the project have lasting impact? Will additional resources be needed to maintain the value of the project, and if so, has that issue been addressed in the proposal?	Scale of 1 to 10
Demonstration Value and Transferability	Will others be able to take lessons from this project, and perhaps replicate it? Will the results of this project be shared with appropriate stakeholders, partners, and/or other COA members? If so, how will that be accomplished? Is any part of this project destined for a patent that will inhibit sharing with other COA members? If so, please describe which part and timeline for establishing the patent.	Scale of 1 to 10
Budget		
Cost Effectiveness / Budget	Is the budget appropriate and cost effective? Are the line items budgeted justified in the project narrative? Are project partners being resourced appropriately? Can the work described be done with the amount of funds requested/proposed as match? In-kind and cash match is not required but is highly encouraged.	Scale of 1 to 20
	Total Score Possible	**100**

Application Review Process

Each application is reviewed by a Technical Review Committee (TRC), composed of individuals who are subject matter experts in the fields supported by this RFP and represent communities engaged by projects funded by this RFP. The TRC will include 1 – 2 COA Partner representatives; upon committal of reviewing, their respective organizations will not be permitted to apply for this award program this year. The TRC ranks and scores all applications based on the criteria listed in the "Evaluation Criteria" section and meets to discuss the application merits. The TRC then recommends a suite of applications for awards and declines to the Trust's Board of Trustees.

The funding partners reserve the right to fund projects and budget items that advance their missions and meet specific funding priorities and criteria.

To allow applicants to set expectations prior to investing time in applying, the Trust provides historical application approval rates for the same or similar programs. The average approval rate from the last three rounds of this program is 85%, including both fully and partially funded applications.

Awards and Notifications

The FY24 Chesapeake Oyster Innovation Grant Program awards will be announced in December 2023.

The final outcomes of these awards are intended to be shared with the public in the spirit of the Chesapeake Oyster Alliance – to drive innovative new approaches and technology among all oyster practitioners and accelerate advancements in oyster industry, restoration, and research in the Chesapeake Bay. Projects that align with this intention will be prioritized and all final products will be provided to the funding partners for use and distribution at the sole discretion of the funding partners. However, we understand some ideas and projects may be proprietary or subject to future patents. If that is the case, please indicate as such in your proposal in the "Innovation and Demonstration value" section of your narrative.

All applicants will receive a letter via email stating the funding decision. An application may be declined, partially awarded, or fully awarded. If approved the Trust will send an award agreement with award conditions and due dates of project deliverables and final reports. The Trust will mail the first award payment to the requesting organization following satisfaction of any award contingencies, including upload of the signed award agreement and/or submission of the first deliverable. Ten percent (10%) of the total grant awards will be held until the final report is submitted and approved. Awards made to for-profit entities will be made as deliverables-based contracts and will be paid as deliverables are submitted and approved. In cases where the awardee fails to submit a project deliverable or final report by the due date, the Trust reserves the right to terminate the award agreement and require a refund of funds already transferred to the awardee.

When the project is complete, awardees are required to complete final reports that may include, but are not limited to, submission of all receipts for supplies, invoices for subcontractors/contractors, and copies of timesheets for personnel time used (timesheets must include date, name, time worked per day, and coding to tie the time worked to the award). All financial back-up documentation from the awardee must be grouped and numbered to correspond to the budget line item reported as spent. Organizations with outstanding final reports will not be awarded additional grants.

Appendix A: Application Components Checklist

Complete all fields in the online application:
- Eligibility quiz
- Applicant Information tab

- Project Information tab
- Timeline tab
- Deliverables tab
- Volunteers tab
- Project Partnerships tab
  - Upload letters of commitment if applicable
- Narrative and Supporting Documents tab
  - Upload a Project Narrative:
    - Use the downloadable Narrative Template that corresponds to the track you are applying for
    - Complete all questions
  - Upload supporting documents
- Budget Tab
  - Upload a completed Financial Management Spreadsheet (FMS)
  - Complete the Application Budget in the online system (should match totals from the FMS)
  - Complete the additional budget justification narrative

Appendix B: Additional Examples of Eligible Project Types

The following list of project types is intended to provide examples, and is not exhaustive:

Track 1: Education
1. Projects that educate residents about the value of oysters and/or aquaculture through the development of scientific web-based content (e.g. – short videos, infographics, etc.).
2. Projects that facilitate information sharing across jurisdictions to accelerate oyster tourism through oyster industry tourism training in areas where it has not yet been fully established.
3. Development of outreach materials specifically for chefs/wholesalers/retailers promoting local Chesapeake oysters, and/or oyster shell recycling.
4. Projects that advance civic engagement regarding oyster relevant topics. While funding cannot support advocacy directly, projects that educate elected officials and engage residents in civic discourse are appropriate.
5. Projects that educate youth through the development of new curriculum materials, or by providing [Meaningful Watershed Educational Experiences (MWEEs).](#)

Track 2: Technology
1. Projects that test creative reuse of materials, new equipment design, or alternative substrates.
2. Projects that employ "off-the-shelf" technology or tools for improving restoration efforts.
3. New concepts for community oyster-growing projects, oyster restoration projects, aquaculture gear or techniques, or other initiatives that enhance either the wild or farmed oyster population in Bay waters.

Track 3: Monitoring
1. Development and piloting of innovative, low-cost technologies for monitoring oyster populations, water-quality, habitat, or biodiversity associated with oyster reefs or farms (e.g., monitoring tools for hatcheries, setting tanks, or in-situ locations; or equipment which can be used to monitor the efficacy of oyster reefs in establishing/enhancing fish habitat).